

Polishing Facilitation Skills



By Merry Neitlich and Anne Gallagher*

So there we were in the most challenging facilitation of our careers.

The goal of this meeting was for the group to narrow down a field of brand options and select one. The chair, also known to her colleagues as Attila the Hun, had strong opinions about everything discussed. We used every tool we knew about in dealing with difficult people. When she monopolized the conversation, we reflected back the essence of what she said and asked for other viewpoints. We redirected the floor back to the disenfranchised participants when she cut them off and told them they were wrong. We were exhausted after more than two hours of this. So were the group members. Finally, she left the room to use the facilities. The group organized a small coup and told us to vote immediately while the chair was gone!

She returned, was surprised, but she finally went with the flow. It was over. We all took aspirin and realized that group momentum can have very positive effects! In fact, dealing with groups and their many dynamics is at the heart of a good facilitation.

When are facilitation skills needed the most?

As marketing professionals, we are all frequently called upon to organize and/or lead various types of meetings. These might be comprised of a group of partners interested in a particular marketing initiative or even a group of marketing professionals in your firm that need to organize or prioritize marketing projects.

When asked to facilitate a meeting, there might be a need to assist with setting goals, creating an agenda, developing consensus among the participants on a particular issue, or in creating meaningful follow-up steps.

Facilitation Guidelines:

There are some tried and true facilitation guidelines that help in preparing for your next facilitation. These include:

- ✓ Start on time – end on time.
- ✓ Use lots of eye contact, nod to participants to show they are “heard” (not to show agreement with ideas).
- ✓ Use a pleasant tone in your voice. Be accepting of all ideas.
- ✓ Frame the question – this takes thought before the group assembles. What do you want the group to tell you?

- ✓ Build little agreements along the way: “So, we agree that this is a good way to state the problem we are trying to solve.” Or, “I think we agree that something has to be done, that things are unacceptable as they are now.”
- ✓ Encourage participants to think and jot down their ideas privately for five minutes before starting the groupthink.
- ✓ Consider placing ideas on flip chart paper alternating between two colors without numbering the items.
- ✓ After all the ideas are captured on the flip chart, review the list by discussing each item briefly. Collapse and condense similar ideas into a single thought.
- ✓ Encourage participants to speak in favor of an idea they believe particularly worthy – or explain why they find an idea troublesome.
- ✓ In certain facilitations, it may be necessary to select the five most important ideas. Have each participant vote privately first jotting down their top five. Then go around the group and mark their ideas on the flip charts. The five ideas with the most checks are the “winners.”
- ✓ Finally ask: “If we do this, are we in line with what we are all about?”

Clarifying Issues:

Facilitations work best when there is a clearly stated challenge to be resolved. At times, you may not have a clearly stated goal at the onset and you will need to clarify the problem or issue at hand before you begin. Once you have identified the specific goals to be worked on, you are ready to begin the facilitation.

The process for clarifying issues prior to the beginning of the actual facilitation include:

I. Force Field Analysis

Force field analysis is useful for clarifying a problem and finding solutions for specific obstacles.

1. Participants are asked to focus on the situation with which the group is concerned – a situation they want changed. They describe in specific terms the attributes of the current state.
2. Participants then imagine what the situation will be like in five years if nothing is done – the worst-case scenario.
3. Participants then think about what the situation would be like if something were done – what would the desired state look like?
4. The next step is to identify the forces driving change and those forces restraining change.
5. Participants use a problem solving process (facilitation) to remove or buffer the restraints.

II. Principals of Problem Solving

1. Let go of the “right/wrong” or “assigning blame” paradigm.
2. Convey respect to all participants in the problem-solving process.
3. Resolve to solve the problem together.
4. Focus on the problem first, and then look for solutions.

Handling Conflict in a Meeting

If meetings are well planned, conflict is less likely to surface. If it does, it probably needs to. The most common reaction to conflict is avoidance. Repressing conflict, pretending it does not exist,

hoping it will go away, or admonishing participants for disagreeing are all forms of avoidance. Generally the conflict does not disappear, and often, the situation worsens.

The facilitator is in a good position to help participants engage in constructive conflict. Understanding the nature of conflict, its sources and patterns helps the facilitator remain centered when participants begin to develop oppositional stances on goals or strategies in the planning process.

When it appears addressing a specific conflict takes precedence over planning, there are a few principles to keep in mind:

1. Allocate sufficient time.
2. Help the participants clarify what the conflict is about.
3. Do not take sides.
4. Affirm the validity of all viewpoints.
5. Frame the conflict in terms of a problem to be solved.
6. Create space for problem solving to occur.
7. Help participants save face.
8. Discuss what happens if no agreement is reached.
9. Ask if the group can proceed with what they do agree on and hold back on the areas of disagreement.
10. Keep in mind that ultimately, the participants have the responsibility to resolve conflict.

Dealing with Difficult People

It is imperative to listen to everyone's viewpoint – even those of difficult or disruptive participants. What is crucial is knowing when to cut off or redirect negative or even dysfunctional behavior. Keep the principals of "Active Listening" top of mind. That includes reflecting back the key message(s) the participant is trying to get across. It is critical for difficult people to be "heard" in order for them to be able to move on or to listen to others.

The following phrases are often helpful in dealing with difficult people:

- ✓ "Can you summarize your ideas or thoughts in a few key phrases so we can capture them?"
- ✓ Reflect back that you "heard" (but not necessarily agree with) what the person said. "I think I understand how you feel about this. Let's see if we can hear a few other viewpoints as well."
- ✓ "John, those are good thoughts. Do you have any other opinions to express before we go back to issue #2?"
- ✓ "Thank you for the feedback. Unless there are additional comments, we need to move on to our discussion of the next issue."

Facilitation Wrap-up and Follow Up: Creating Specific and Measurable Goals

Every successful facilitation has a successful wrap up. Participants need to leave with a strong sense of what was accomplished and what will happen next. The following questions are often used at the end of the facilitation or to be used as follow-up:

- ✓ Who might share your interest in achieving this goal?
- ✓ How might you enlist their involvement in helping you achieve the goal?
- ✓ Who else needs to be involved in achieving this goal?

- ✓ Timeframe: How long will it take to achieve this goal? How will you know when your goal is accomplished?
- ✓ When do you plan to begin?
- ✓ When will you complete your goal?
- ✓ List specific tasks (in chronological order) you see as necessary to achieve this goal.
 - 1.
 - 2.
 - 3.

The bottom line is that facilitating requires a higher level and more refined use of skills than just running a meeting. With a little practice, you will find that your meetings are more productive, take less time and give all participants a greater sense of satisfaction.

*Merry Neitlich and Anne Gallagher provided training on this topic to the participants at the LMA Leadership Conference. This article is a synthesis of that training session for marketing professionals, *Advanced Facilitation Skill Training*.

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